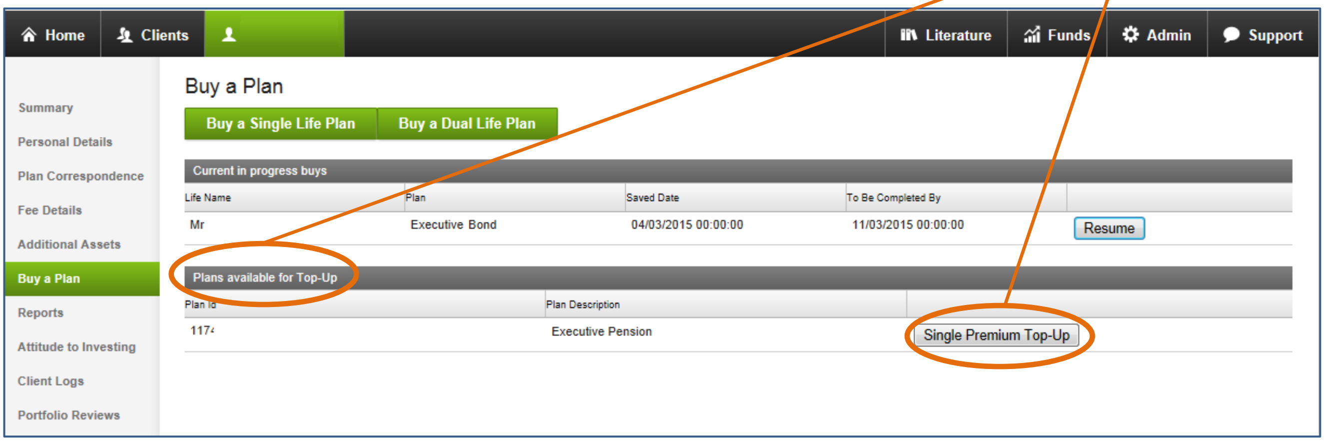
APRIL 2015

PORTUS RELEASE 9.0 UPDATE

The Portus development team are pleased to announce that the latest release of the Platform portal went live on Friday 16th April 2015. Our focus was based primarily on your feedback. In this release we have developed a number of New Features such as: the Single Premium Top Up facility and enhanced a number of existing features: Client Reporting and Funds Screen.

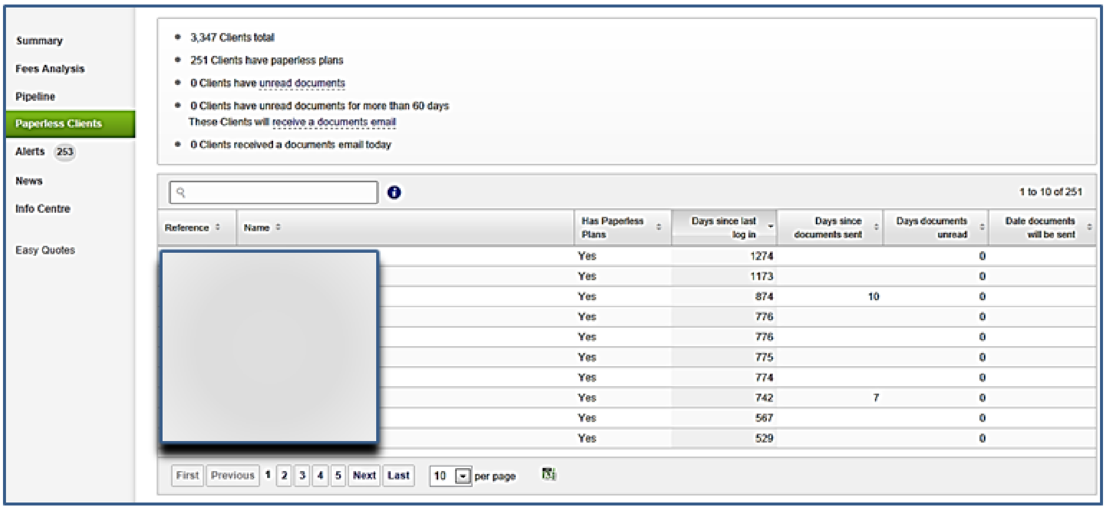
1. Single Premium Top Ups - (New Feature)

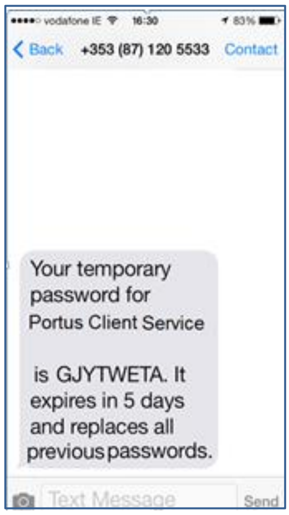
This new feature allows you to apply Single Premium Top Ups to Personal Pension, Company Pension, Investment Only (Pension) and Investment Bond contracts. The client 'Buy a Plan' option will now include the new Top Up feature by displaying plans available for Top Up (as per below).



2. Paperless Clients:

This facility has been developed to cater for the situation where a client has selected the 'paperless' communication option but has documents on their B2C that have been unread for more than 60 days. In these cases we will email the client with password protected copies of their documentation and send on the password via text message.



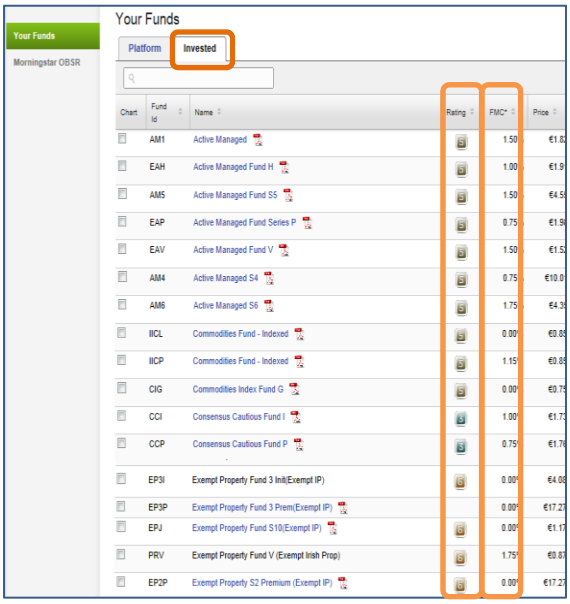


The 'Paperless Clients' feature is found on the Business Summary screen and identifies all clients who have signed up to the Paperless option; those with unread documents, those to whom an email containing documents as described above will be sent & those to whom an email has been sent . This screen is updated daily.

3. New 'Invested' tab on Funds screen:

We have enhanced the Funds screen by including a new 'Invested' tab. This new tab includes:

- A Listing of Legacy funds that monies have been invested in.
- A new Column for each fund showing the current Risk Rating, calculated monthly using the latest fund asset mix.
- A New field for each fund showing the primary fund FMC
- Provide an export of daily price history.
- Provide a PDF option on each screen.
- Some of the new fields have yet to be initialised. This will be resolved over the coming weeks.



4. New Short Form Version of Client Report -

As part of Release 9 we have designed a new 'Short Form' version of the client report. The Short report option is available under the Client Reports tab, where you can now select a Long and/or Short report. (Snapshot of Short Form below):

5. Enhancements to Client Report -

- On the plan summary page, we will now use 'Amount received' instead of net amount invested.
- The Report will now include a table of Cash movements with the IRR chart.
- Policies will be split into new Policy groupings - Pensions, ARF & Investments and Protection.
- We have increased the size of the font in the body of text from 8 to 10.

6. **Other System enhancements include**:

- Fix to stop B2C registration from crashing where attempted on the same day as a new policy has been submitted
- Improvements to the wording on the B2C logon/Security Screens to make it easier for clients.
- A New Analytics tool to provide Comprehensive data on Platform usage at a user level.
- Remove the words 'Pension' and 'Exempt' from the primary fund name list held in Platform

As always your feedback is really important to us to ensure we continue to develop a platform that makes it easier for you to do business. In addition to these main changes, the release has a host of smaller fixes and functional enhancements. A full list of all of these changes is available in the news section.

If you require any further information, or have any comments or feedback on this release or if you would like any additional training on any of these new Features please contact Donal Wood, Head of Platform Development & Deployment or Niall Cooke, Platform Business Development Manager.

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